

Duragesic®

Congratulations to the 275 Sales Force! With your leadership, DURAGESIC attained numerous all-time highs in prescription and dollar volume in 2000. Due to your efforts, for the first time, DURAGESIC attained \$400 million in 2000. The strategic focus, sales direction, sales materials and programs for 1st cycle 2001 are designed to enhance your ability to appropriately position DURAGESIC as the 1st choice, long-acting opioid for chronic pain. Thanks to you, 2001 promises to be an exciting time for DURAGESIC –we will surpass Half-a-Billion Dollars in Sales!

Market Update:

- The chronic pain market continues to grow rapidly and represents significant growth opportunity for DURAGESIC
- In 2000, the market grew nearly 50% versus 1999. The majority of this growth is a result of the dramatic growth in the chronic non-malignant pain market.
- DURAGESIC grew at 28% in 2000 and posted several all-time highs in monthly prescription volume
- DURAGESIC will exceed half-a-billion dollars in 2001.

Strategic Focus:

- **High Deciled Physicians**
 - The high deciled physicians continue to represent significant opportunity for DURAGESIC due to their high volume prescribing of chronic pain medications and the disparity in share between OxyContin and DURAGESIC. Even though our deciling methods has changed, the same 8,000 physicians that we focused on in 2000 are still those we will concentrate on in 2001, with even greater emphasis being placed on the top 1000 who account for 20% of all the dollars in the pain market.
- **Life. Uninterrupted**
 - In 2000, we conducted extensive market research to assess the effectiveness of our new promotional campaign. Physicians overwhelmingly stated that the "Life, Uninterrupted" message was credible and compelling enough to cause them to prescribe DURAGESIC as a 1st choice for chronic pain. This positioning statement will continue to serve as the cornerstone for all brand related activities in 2001.
- **Expand DURAGESIC Use in Non-malignant Pain**
 - Physicians are becoming more comfortable using opioids in non-malignant pain. Our objective is to convince them that DURAGESIC is effective and safe to use in areas such as chronic back pain, degenerative joint disease, and osteoarthritis. It is important to remind physicians that the APS, AAPM, and AGS have all endorsed the appropriate use of opioids to manage chronic, non-malignant pain.

